RDI Associates Ltd

Feasibility Study for the Processing and Marketing of Wild Venison in the East of England

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on behalf of

The Deer Initiative

by

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Executive Summary

There is a large and expanding deer population in the East of England which will continue to expand unless concerted and coherent action is taken to manage it.

This population is already having a significant and unacceptable impact upon the profitability of agricultural and forestry businesses in the area. It is resulting in an increasing number of road traffic accidents and is a major factor in the decline in the biodiversity value of the regions' woodlands.

Whilst some landowners and stalkers are engaged in managing the deer population the measures they are currently employing are failing to keep pace with the rate of population increase. The cull target needs to increase by approximately 25,000 head just to maintain populations at current levels.

There is already a market for more venison and some of this additional venison could be dealt with by existing processors

There is an issue with the quality of some of the carcasses entering the supply chain.

There is interest from the landowners to invest in larders and processing equipment and from processors to expand their processing capacity.

There is insufficient financial commitment from land owners to allow any single landowner to establish a reasonable sized processing facility however there is considerable evidence of a willingness collaborate and share facilities and this would probably enable the creation of a number of local processing facilities throughout the region.

One processor has expressed an interest in building a new large regional processing facility. It is suggested that any bid for funds for this size of facility should be dealt with as a separate application.

The main area of failure is at the beginning of the supply chain, insufficient deer being shot resulting in insufficient carcasses of the right quality being brought to the market.

This study recommends:

A project to engage with, connect and support all aspects of the venison supply chain.

Awareness raising and training for landowners to enable them to recognise deer impacts, engage with stalkers, implement deer management plans and if desired set up processing facilities.

Training for new and existing stalkers to ensure safe, efficient and humane culling of deer and the production of good quality carcasses.

Training in butchery, product development and marketing.

Support for capital items such as high seats, ATVs and trailers, (rifles?) and larders.

Capital support for some new local processing facilities.

Capital support for equipment to increase the capacity of existing processing facilities.

Capital support for specialist carcass and venison transport vehicles.

Introduction

The Study

This study has been commissioned by the Deer Initiative to support their application for RDPE Axis 1 and 3 funds from the East of England Development Agency for a project in order to improve the venison supply chain and develop a more sustainable management regime for wild deer in the East of England.

This study looks to identify

- Whether a market exists for wild venison, if so where it is – are there markets locally? Nationally? Is there potential to expand? Through what mechanism?
- Is there a potential for expanding the export market? For how much and what type of product?
- If the market could be developed, to what scale and over how long a period
- What is the perception of wild venison? If negative how could it be improved? What are the end users understanding of the benefits from eating wild venison?
- Is any targeted marketing needed?
- What is the value that consumers would place on wild venison?
- Where and who are existing or potential suppliers?
- What is the current economic value of wild venison in the region? What is the potential, a secure supply chain in place, likely to be in terms of income, jobs generated and businesses supported?
- What existing initiatives could the Deer Initiative complement and add value to in the region?
- Would there be displacement with farmed venison?
- Are there possible linkages to existing game dealers and suppliers?
- How many further processing plants are needed to meet potential demand and where best located?
- Is there potential private sector support to a mainstream strategic project?

Study Methodology

The study is informed by surveys of landowners, stalkers, processors and the catering sector and by telephone and face to face interviews with members of those groups.

The Project

The project has been initiated by the Deer Initiative which is seeking to access RDPE funds from Axis 1 and 3 in order to develop a more sustainable management regime for wild deer in the East of England.

The project will facilitate the development of a food supply chain of wild venison from the countryside in the East of England through to end users both in the region, nationally and abroad.

The very high deer population of the region presents a severe threat to the ecological importance of many types of woodland, particularly Ancient Semi-Natural Woodlands. Without effective management, it is expected that deer numbers may double within the next few years, with resultant greater impacts on woodlands, humans and animal health.[1] Wild venison as a product is a healthy alternative to other red meats but currently underused as a raw material[2]. It is estimated that by managing the deer population of the region it could produce an estimated average economic return of between £950,000 and £2,500,000 p.a. through adding value and marketing 10,000 processed deer.

This project fits with the RDPE in the East of England RIP in terms of strategic need. Deer browsing and other impacts have been highlighted as a key regional issue. It also fits with the following themes:

- **Business efficiency** - in terms of generating a new supply chain and producing a quality product that has full traceability.
- **New markets and products** – in terms of adding value to regional raw materials and developing new markets
- **New businesses and enterprises in the rural economy** – through collaborative working new businesses will be established and existing ones will diversify
- **Conservation of the natural, built and historic environment** – through careful management the key outcome will be to conserve and improve natural habitats.

The project will meet with the criteria as set out in the EAFRD regulations and will be looking to access funds from across Axis 1 and 3 as well as supporting projects that are looking to attract funds from Axis 2.

To summarise, the main constraints on effective deer management are failings in the supply chain at several levels. The project looks to address those supply chain failures and put in place a supply chain and market structure that would then be sustainable and self-supporting.

Surveys and Interviews – Analysis and conclusions

Analysis of Landowner Survey

An online survey of landowners was carried out during 2009. Contact with landowners was facilitated by the CLA, NFU and Anglia Farmers who emailed all their members within the region asking them to respond to the online survey and inviting those who wished to discuss it further to contact the researcher.

A total of 62 people responded.

67.7% said that deer management was currently taking place on their land. This figure may appear higher than expected given that the DI believe that insufficient deer management is taking place however it is not unexpected as those who were already interested in deer management where more likely to have responded to the survey.

[1] Woodland for Life - Regional Woodland Strategy for the East of England (2003)www.woodlandforlife.net

[2] www.thedeerinitiative.co.uk

Of those where no deer management was taking place 84.6% said they would consider allowing it only one person 3.8% said no and 3 people 11.5% believed that they had no deer on their land. This was particularly important as it indicates that the majority of landowners not currently managing their deer would do so if more advice and support was available to them.

80% of the carcases being shot were going to an East of England processor with the remaining 20% being processed in a facility on site. Interestingly in the comments one person was also processing carcasses from neighbouring estates indicating that some collaboration of this type is already taking place. Some carcase were being taken by the stalkers and some were being processed off site and then returned to the landowner for resale or own consumption.

There was some confusion over the question of whether the respondees had farm shops or similar retail outlets, however; when asked if they had a farm shop or similar retail outlet 4 respondees said yes and four respondees were also selling wild venison through their retail outlet. Although this appeared to indicate that all those with retail outlets were already selling wild venison a further 6 people said that they would sell wild venison through their retail outlet if it was available and one was currently applying to the local authority for registration as an approved processing facility.

A surprisingly high number 50% were interested in having a processing facility on their land and the majority of these 32.5% (of the original 100%) were prepared to make it available to other landowners and stalkers.

However when it came to the amount of money they were prepared to invest the responses were more circumspect. Not surprisingly the majority 69.2% wanted the highest level of grant aid of 40%-50% suggested. But 50% were also only prepared to invest upto £1000 in any facilities, while this would not be sufficient to purchase any processing facilities it would however go some way towards the purchase of a chiller unit. A further 42.8% were prepared to invest between a £1000 and £10,000 and only 7.1 % or 2 respondees were prepared to invest upto £25,000 the sort of figure required to set up any sort of efficient and regulation compliant processing facility assuming additional grant aid of 40%. No landowner was prepared to invest more than £25,000 which is well below the minimum figure that would be required for any sort of regional processing facility.

Encouragingly 94% of landowners were interested in linking in to a regional initiative, 79.1% were aware of the Deer Initiative and while approximately 50% had not attended any DI awareness or training days 71.9% would like to participate training days in the future.
43.3% were prepared to pay upto £50 per person per day, 40% between £50 and £100 and 13.3% £100 to £200 per person per day indicating that there is a considerable appetite for and a preparedness to pay for relevant good quality training.

The respondees were also asked what they felt would most help the increased marketing of wild venison in the East of England. Nearly 50% were in favour of some sort of public awareness/advertising campaign. Some wanted more competition between processors, some wanted to see sales into supermarkets and some wanted better connectivity within the supply chain.

Conclusions

Many landowners are already aware of the Deer Initiative, they are becoming more interested in deer issues and are prepared to engage with the Deer Initiative, they are interested in and would value more training in deer management.

Many are interested in getting more involved in supplying venison into local markets and are willing to invest a limited amount of money. The amounts of money they are willing to invest could make a significant difference to the number of chiller and collection facilities in the region and may create a few small local processing facilities but is insufficient to create any new regional processing hubs.

Analysis of Stalker Survey

An online survey of stalkers was carried out during 2008. Contact with stalkers was facilitated by BASC and BDS emailing their members. A total of 208 people responded to the survey.
Only 10.1% described themselves as professional stalkers the remaining 89.9% considered themselves to be recreational stalkers.
While 23.4% lived within 20 miles of where they stalked 62.1% lived over 50 miles from where they stalked, and of these 33.9% lived over 100 miles from where they stalked. The distance that stalkers have to travel to where they stalk will have an impact upon how often they visit that land, the amount of time they can spend on that land, how well they know that land, how well they know the deer population and the costs they incur in stalking.

The total number of deer shot by the 162 stalkers who responded to the question was 4250. The number of deer of each species shot was Fallow 1688, Muntjac 1509, Roe 892, and Red 161.

Interestingly when asked how many of these went to a game dealer the percentages for each species were quite different. Fallow 70%, Red 68%, Roe 42% and Muntjac 24%. We can only speculate on these differences but possible reasons are:

- The higher price paid per carcase for the larger deer make it more worthwhile transporting the carcase to a processor.
- The smaller carcases are easier for the stalker to butcher for their own consumption.
- The smaller deer are favoured by the stalkers for their eating quality.

When asked about their capacity to increase the deer cull 73.6% of stalkers said they had the time capacity and desire to do so.

However when asked what they perceived as the barriers to achieving this, their answers were more complex.

57.6% felt they had insufficient time.
74.3% felt that they had insufficient land available to them. From the stalker survey this was the most significant perceived barrier.
Significantly only 27.4% felt that they had already achieved the cull limit on the land available to them.
34.9% felt there was a lack of facilities to store or handle carcases.
Only 17.1% felt that there was a lack of markets for carcases.
Whilst 24.8% felt that a low carcase price was a barrier.

When asked similar questions as to what would encourage them to shoot more deer, the answers were sometimes similar but interestingly sometimes different.

79.7% wanted more land to stalk on.
41.1% said that hey would be motivated by increased cull targets set by the landowner/manager.
43.5% felt it would require more local collection/storage facilities.
43.1% wanted better links to game dealers and processors.
Only 26.2% felt that they needed better knowledge on how to present carcases to the market.
46.2% felt that an increase in carcase price would encourage them to shoot more deer, a significantly different response than in the previous question.

When asked if they would be interested in taking part in development training for example in carcass handling, presentation etc 73.3% said yes. This was interesting given that in the previous question only 26.2% felt that they needed to improve their knowledge on how to present carcases to the market.

Conclusions

The majority of stalkers are recreational.
The majority live a considerable distance (over 50 miles) from where they stalk.
The majority have the inclination to shoot more deer.
Time is already a factor in how many deer they shoot and would be considerable constraint to them shooting more.
They would nearly all like more land on which to stalk (probably also closer to home). Given their time constraints they see having more land as the most significant way in which they could increase their cull.
A significant number of them recognise that they are not currently culling enough deer on the land that they have access to and that higher targets set by landowners and land managers would encourage them to shoot more.
A higher percentage of the larger deer than the smaller deer are sold on for processing, this is probably due to the lower cost per kilogram in transporting the carcass to the processor and the higher price per carcass paid by the processor.
Carcase price is not currently seen as a significant factor by the majority of stalkers. This is probably because most of them are currently setting their own cull targets and are comfortable with what their stalking is costing them. How ever if they are required to increase the number of deer they shoot then their costs will also increase and they can see that an obvious way of offsetting those costs is from an increase in carcass price.
A significant number recognise that improved local collection and storage facilities and better links to gamedealers and processors would help them to shoot more deer.
Although most felt that they already had a high level of competence they were still receptive to the idea of further training. This is important given that poor carcase handling and presentation was identified as a serious issue by many processors.

Analysis of Interviews with Processors

Six processors were contacted and interviewed over the telephone using contact details supplied by the regional DI Deer Liaison Officer.

The processors interviewed covered a wide spectrum from those who were processing carcases from their own land to large processors who were processing large number of carcases acquired from throughout the region. All were AGHE and some were registered EU cutting plants.
One producer interviewed was a very new business and because of the newness of their business their answers differed significantly from the majority. Unless stated the response of this new producer have not been included in the analysis.
Some were processing all of the four main species found in the region, red, fallow, roe and muntjac, whilst others were more specialized dealing in only one or two species.
The smaller ones were sourcing direct from stalkers or landowners whilst the larger ones were also sourcing from game dealers who pulled together supplies from several sources.
Some were selling into a very local market by either by retailing themselves or by selling to local butchers and farm shops, whilst some, especially, but not exclusively the larger ones were selling nationally especially into the London market and internationally into Europe. Many had a website and were selling mail order from that website.
With only one exception where the processor was a very new business all of them were unable to get enough carcases to meet their current demand.
All could already sell more venison probably in the region of 20-30% more and felt that there was room for further expansion in all market areas and most had some spare capacity.
There was an issue over the quality of the carcases. This was mostly to do with shot placement and subsequent carcase handling which could result in contamination of the carcase sometimes leading to contamination of several carcases in a batch. Not unexpectedly most would like all carcases to be head or neck shot but there was an acceptance that this was not always compatible with the requirement for humane and efficient despatch. They believed that stalkers would benefit from

more training in shot placement and carcase handling. The provision of better quality carcasses would enable them to pay better prices for carcases.
Most would consider expanding if demand, but in their view more importantly supply of carcases increased.
Generally this expansion would require more carcass handling equipment such as rails, chillers, scales and vacuum packers.
Most of them marketed by species at some level and species differentiation was one way of them improving profit margins.
They all had their own marketing brand which they were very proud of and none were interested in being part of a regional marketing brand.
Some were however interested in being part of a regional marketing campaign but the extent to which they were prepared to put money into this was less certain.

One processor, Mark Burrage of Bluebell Venison was keen to build a new regional processing plant capable of handling many thousands of carcasses per season. His initial estimate for this plant including all costs was in the region of £2.5 million. This proposal is clearly worth further investigation although it would appear to require a big jump in his current infrastructure both on the marketing side but more importantly on the supply side of his business.

C&K Meats are building a new State of the art abattoir at Eye in Suffolk to service local livestock producers. The facility is designed to process at least 221,000 domestic livestock carcases per year. They are very interested in getting involved in the venison supply chain especially if they can be guaranteed a regular consistent supply of carcases.

There are many processors based outside the region who nonetheless are either already accessing or would like to access carcasses from within the region either for the national or international market.

Conclusions

The processors are businesses and have to cost all their operations.
The processors believe that currently the biggest constraint to expanding the market is the supply of good quality carcasses.
The processors feel there is a need for better stalker training in shot placement and carcase handling.
If the processors are collecting carcases there is a significant cost involved in collecting a small number of carcases which may also not have been kept in the best conditions.
The processors would welcome a network of chiller units being shared by landowners and stalkers from which they could collect larger numbers of good quality carcases.
The processors have spare capacity and would be willing to expand if additional carcasses became available.
At the processor level there are opportunities to tie the venison supply chain in with the supply chain for domestic livestock which could give venison access to the mainstream markets.

Analysis of Hotel and Catering Establishment Survey

An online survey of hotel and catering establishments throughout the East of England and neighbouring counties (to increase the sample size) was conducted during August 2008. Contact information was obtained from LBM, one of the UK’s leading marketing services companies.
The business categories included and the relevant SIC (Standard Industrial classification) Codes were as follows: -

50000 - Hotels and Restaurants
50110 - Hotels
50200 - Eating and drinking establishments
50241 - English Restaurants
50242 - French Restaurants
50250 - Other restaurants
50256 - Restaurants - Pub Food
50272 - Pubs, Bars and Inns
50300 - Canteens, catering and rooms for hire
50312 - Catering Services
50313 - Mobile Catering Services
50321 - Banqueting and function rooms

A total of 572 surveys were successfully delivered to addresses and a total of 29 establishments responded. This represents a response rate of 5.06%, which is approximately twice the expected response rate for uninvited online surveys.

The particular issues which are worth highlighting are as follows: -

- the high level of response indicates that there is above average levels of interest in wild venison as a product
- subjective bias inherent in respondents precludes extrapolation to, for example regional volume demand, but do nevertheless suggest an audience receptive to enhanced marketing activities
- whilst a 57% proportion currently using venison underlines the above, that 39% who responded had used it but no longer do is of greater value in determining market potential and highlighting barriers to growth (Q1)
- 67% of respondents had used wild venison, either exclusively or in addition to farmed venison (Q2)
- 92% considered wild venison to be ‘always’ or ‘usually’ of good quality, which although expected given a developed customer/supplier relationship, is very high (Q3)
- availability and reliability of supplies achieved slightly lower satisfaction levels and in particular 28% of respondents indicated that venison was ‘sometimes’ or ‘rarely’ available in the quantities required (Q3)
- these responses are supported by the indication that the major limiting factor on sales are customer demand and a desire to balance menu’s rather than availability (Q4) and that lack of customer demand is the primary reason for respondents no longer using wild venison (Q5)
- nevertheless, poor quality (21%), unreliable supply (29%) and cost (29%) were all at levels in excess of what are required for a sustainable demand led supply chain (Q5)
- despite these issues 94% of respondents who had stopped using wild venison would consider using it again if the problems could be overcome (Q6)

- of those who had never used wild venison, 87% had never been offered it and 37% had never been asked for it by customers (7). Only 12% said they did not know where to buy wild venison (Q7)

- 89% of respondents who had never used wild venison would be interested in trying it if offered at a reasonable price (Q8) and 80% of such respondents did not consider there would be any customer resistance (Q9)

- a relatively high level of demand was reported with 22% indicating they could utilise more than 50 servings per week (Q10)

Conclusions

- the catering and hostelry sector is widely receptive to the concept of using wild venison

- consumer orientated marketing is important to raise demand amongst the sector

- this marketing should focus on the benefits of venison in terms of health, localness of supply and taste

- other surveys suggest marketing of wider economic and environmental benefits are unlikely to significantly affect consumer demand in a lasting manner

- significant improvements in both quality and supply will be required if this raised consumer demand is to translate into significantly increased sales volumes demanded by the sector

The Current Situation

Deer in the East of England

Wild deer are an important part of our wildlife and are attractive animals that people enjoy seeing in our countryside. They must however be managed to keep them in balance with their habitat and prevent serious damage to woodland SSSI's, tree plantations, agricultural crops, gardens and other wildlife.

In 2004 it was estimated that the current wild deer population in the East of England was 76,000. With the current management regime it is likely to have increased at a rate of approximately 15% per annum. We must assume therefore that the current wild deer population in the region is approximately 152,900. This is not sustainable for the long term without a more managed approach of intervention. Damage from the wild deer is causing significant damage to the profitability of woodland businesses and ecological biodiversity. If management continues only at current levels by 2013 the deer population could be as high as 475,643.

Land managers want to see a sustainable wild deer population in the East of England, but are concerned that if they are present in large numbers they are very destructive to trees, crops and important natural habitats..

Damage from the wild deer is causing significant damage to the profitability of woodland businesses and ecological biodiversity.

Deer damage woodland in several ways. The most obvious damage is fraying where the male deer rub their antlers against the stems of trees and shrubs resulting in damage to the bark.
Deer also damage trees by browsing, this can be browsing the side branches and leader of small trees leaving them stunted and deformed or less obviously but more significantly by eating the seedlings of young trees removing them completely and preventing natural regeneration of the woodland.

As well as young trees deer also eat a wide range of shrubs and herbaceous plants, whilst this may not have an economic effect upon the woodland it often has devastating effect upon its biodiversity. Not only do you lose the plants but also the invertebrates that live on those plants and the birds and animals that feed on those invertebrates.
Damage to woodland plantations and forestry is conservatively estimated at between £0.6 and £0.9 million per year and damage to conservation valued at £0.3 million per year.

Deer damage agricultural crops by trampling and grazing. The grazing takes two forms, either grazing of mature and semi mature crops, which has a direct effect upon yield, or grazing of newly emerging crops which can require the farmer to re-cultivate and re-sow the crop with the costs which that entails plus a delayed and possibly lower yield harvest.

The cost of damage to agriculture has been estimated in 2004 at between £1.9 and £4.6 million p.a. and recently an increasing numbers of landowners and farmers are reporting agricultural damage.

The increase in the number of road accidents involving wild deer is a matter of major concern in the East of England. Where busy roads pass through areas of high wild deer population the risk both to motorists and the wild deer themselves is considerable. The economic cost of wild deer related road traffic accidents in the region are estimated at £4.3 - £4.8 million p.a.

Based on the assumption that populations increase over the next 10 years at the same rate as ranges have expanded over the last 30 years, recent research suggests that in the next 5 years, the market cost of wild deer to the region will be £8.8 to £11.5 million, and that this will increase to a cost of

£10.1 to £12.4 million in 10 years. These changes will be equivalent to a 12- 25% increase in costs over the next 5 years and a 21-44% increase in costs over the next 10 years.[3]

In economic terms the damage to the region's economy in terms of damage to crops, traffic accidents and trees, woodland flora and wildlife habitats is estimated to be a net cost of between £7.0 and £10.2 million per year.

Existing Supply Chain

The United Kingdom venison supply chain is dominated by three main processors, but venison price is largely dictated by world market prices. Farmed venison and imports from New Zealand are the main factors influencing prices. Consumer demand in the UK has historically been low.

In Scotland in many cases venison is first and foremost a by product of sport shooting and the income generated from it is relatively small compared to that derived from the sporting let itself and increased venison prices are unlikely to lead to a higher deer cull.

In England the situation has proved to be different. In the stalker survey, although only 24.8% regarded the price paid for carcases as a significant barrier to shooting more deer, when asked if a better price for carcases would encourage them to shoot more deer, 46.2% said that it would; confirming that both professional and recreational stalkers view venison income as an important component of the economics of stalking and will respond if that income can be improved.

The existing supply chain for getting animal to plate is diverse and varied with many different models:

- The simplest model is where the animal is shot by the stalker, gralloched in the wood, hung in a very simple larder (often a shed) skinned, butchered on the kitchen table and the venison ends up in the stalkers freezer for their own consumption.
- The first extension of this is where the venison is passed on to friends and family, or sold to the local butcher, pub or restaurant.
- Other stalkers will sell carcases that are excess to their own consumption to a game dealer or processor.
- Some landowners will retain the carcases and then either sell them on to a processor or butcher, or have them butchered and then re-sell the venison themselves through a farm shop, or sometimes even through their own catering facility. Some landowners may also have their own processing facilities.

- The venison processors are of varying size and capacity, some only selling back into the local or regional market either as retailer or small wholesaler while others are selling out of the region notably into London but also nationally and exporting to Europe.

All of these models are valid and exist in the East of England. Each of them will require support if the objective of a sustainable deer population in the East of England is to be achieved.

[3] Source: Economic Impacts of Wild Deer in the East of England; Piran C.L. White, James C.R. Smart, Monika Böhm, Jochen Langbein & Alastair I. Ward; January 2004

Wild Venison

Benefits

Venison is a healthy alternative to conventional red meat. It is a very lean meat, very low in cholesterol and full of flavour.

Table 3: Nutritional value of venison compared to other meats

Nutritional information per 100g compared to other meats.			
Roast	Protein	Fat	Calories
Venison	33.5	6.4	207
Beef	26.8	21.3	225
Lamb	20.1	17.9	273
Pork	26.9	26.9	284
Chicken (skinless)	22.6	14.0	216

Public Perception

It is very difficult to gage the public perception to venison however experience is showing that the public are very open to being persuaded of the benefits both to themselves and to the environment of eating venison. The fact that the processors are saying that they could sell considerably more venison into all areas of the market suggests that venison is beginning to become more mainstream. This must be due in part to the plethora of television cookery programmes where celebrity chefs are increasingly using venison in their recipes but also to local initiatives and promotions by some of the processors and landowners (such as the National Trust) either selling cooked venison at events, shows and farmers markets or explaining the need for deer management and advertising their venison.

Market Potential

There are very few statistics available from the Meat Livestock Commission (MLC). Overall however, anecdotal evidence suggests that there is an expectation for the growth in demand for venison to be greater than for other red meats. In December 2005 Waitrose reported year on year sales of venison had risen 40%.[4]

The results from the survey of the catering sector appeared to suggest that the main constraint on them selling more venison was customer demand rather than venison supply. However all of the processors interviewed (with the exception of one who had just started up) were confident that there was considerable potential to increase their sales of venison, regionally, nationally (especially into London) and by exporting more to the continent.

If we are to maximise this market potential it is clear that all parts of the supply chain, whether stalker or processor must supply what the customer wants. For example whilst there is an export market for whole carcasses in the skin some processors are also developing export markets for species specific more processed products. In the retail market whilst there is some demand for whole carcases butchered, the real potential is in the development of a consistent supply of specific cuts and products. This will be key if wild venison is to penetrate the supermarket, catering services and restaurant trade.

There is also evidence that exports of farmed venison from New Zealand have declined from 450,000 carcases p.a. to 300,000 as result of New Zealand deer farmers changing farming practices to supply the more lucrative market for dairy products developing in China. This opens a significant window of opportunity for local wild venison to penetrate the market.

Constraints on bringing carcases to the market

To understand the constraints on bringing carcases to market it is first essential to understand the motivations and objectives of those involved in the supply chain.

Land owner motivations and objectives Landowners have different motivations and objectives. At one extreme are those owners who really like to see deer when they walk in their woods, do not recognise the impact that the deer are having and will not allow any deer to be culled on their land. At the other extreme there are those who are very keen on their woodlands and who are managing them to produce high quality timber, recognise the impact that the deer are having in their woods and want to see either no deer or a very limited number of deer on their land. These owners will take every opportunity to cull deer. The majority of owners lie between these two extremes and their views and objectives are informed by a whole host of things.

Some owners are not aware of the number of deer they have on their land, are not managing their woodland productively, so do not recognise the impact the deer are having and consequently do not put a value on the cost of the damage they are doing. Some owners believe that the cost of managing their deer will be very high. Some owners derive an income from stalking, are reluctant to lose that income and are guided by their stalker. Some owners leave the deer management to their gamekeeper and are guided by that gamekeeper.

Some owners recognise that they have deer on their land, value the contribution the deer make to their land but also recognise the impact that the deer are having. They decide what level of impact they are able to tolerate and set objectives and strategies to manage the deer to achieve that level of impact.

[4] The Promotion and Marketing of Quantock Venison, The Thoroughly Wild Meat Co Ltd, June 2006

Stalker motivations and objectives

Stalkers can be described as falling into one of 3 main catigories:

Recreational stalkers

Most stalkers (85%+) are recreational, they derive their main income elsewhere, they will either undertake culling for no charge or will pay a varying amount of money for their stalking. Recreational stalkers often have a limited amount of time to devote to stalking and during the time that they do have they want to be able to shoot a deer, this means that the population is usually maintained at a higher level than the habitat can support.

Commercial stalkers

Commercial stalkers make an income from stalking, either by "sub-letting" the stalking to recreational stalkers usually on a daily basis for trophy heads, making an income from the sale of venison, or by charging a fee for managing the deer. Commercial stalkers depend upon there being deer on "their" land. If they are taking clients out stalking they need to be able to show those clients a deer and preferably a trophy buck within a very limited time. If they are making an income from the sale of venison then they need to be able to maintain that supply, effectively they "farm" the deer. Both of these approaches mean that they usually maintain a higher population of deer than the habitat can support.

Direct employed stalkers

Direct employed stalkers are very occasionally specifically employed to manage the deer eg. Forestry Commission rangers, but more usually are gamekeepers who are required to manage the deer as part of their other duties. Those direct employed stalkers who are solely devoted to deer will usually be managing them for the benefit of there habitat, have deer management training and be very skilled and practiced at their job. They will be trying to maintain the deer population at a level the habitat can support; in practice this will probably mean shooting as many deer as they can. Direct employed stalkers who are also game keepers have varying motivations and approaches to deer management. This will depend in part on whether they are following a deer management plan instigated by the landowner in which case their approach will be similar to that of full time direct employed deer stalkers or whether they are driven more by their own interest in deer stalking in which case their approach is going to be more similar to a recreational stalker.

These are of course generalisations and not every stalker will fit neatly into these categories however a great many do.

Game Dealers and Processors

Game dealers and processors are very much businessmen. Some may have started off as stalkers or landowners and diversified into processing and may still have a stalking connection, others will have added deer processing to an existing domestic animal processing business. However once established as processors they are running a business where quite rightly the prime motivation is to make a profit and they are governed by the rules of supply and demand.
As previously stated the retail price of venison is governed by the price of imported farmed venison mostly from New Zealand so the processors have to operate within this constraint. The price they are able and prepared to pay is governed by this import price, the demand for venison and the availability of the carcases, so when demand is high they will pay a higher price for the carcases and be less fussy about their quality but when supply is high they will pay less and be more fussy about the quality.

Disconnect and distrust within and between the elements of the supply chain

Whilst conducting this study and particularly in conducting telephone and face to face interviews it has become apparent that whilst there are some good relationships within the sector, there is also significant disconnect and distrust both within and between elements of the supply chain. Often this is based upon a lack of knowledge of the roles and responsibilities of others within the supply chain.

For example there is a perception in some areas that processors are 'ripping off' the stalkers and landowners. This is probably based upon the difference in the wholesale price paid by the processors and the retail price achievable for some cuts of prepared venison. However it almost certainly does not take account of the cost of setting up and running a medium to large Approved Game Handling Establishment (AGHE), the cost of complying with the regulations, the recovery rate of venison from shot deer carcase, the issues of carcase breakdown and product balance, the cost of collection and delivery of relatively small amounts of product, how to balance the variability in the supply, quality and species of the resource with the demands of the retail market for a readily available consistent product and the seasonal nature of the product.

Many landowners leave their stalkers to set cull targets and produce often unwritten management plans believing this will achieve their unidentified objectives. But stalker objectives are not necessarily the same as those who want to see a deer population that is in balance with its habitat. This is not a criticism of stalkers it is just human nature that unless otherwise instructed they will set a cull target and devise management plan that fits in with their motivations and the time they can devote to stalking. Landowners need to understand this and take responsibility for setting the objectives of their deer management plans.

It has also become apparent that some processors have felt threatened by this proposed project and whilst the researcher has done his best to counter this perception it will be important that the DI addresses this

Strategy & Policy

National & Regional Policy

Deer are mentioned in several national and regional strategies.

East of England Forestry Strategy-Woodlands for Life

Woodlands for Life States:
'The very high populations of deer and grey squirrels result in further reduction in value due to browsing and bark stripping damage, indeed many owners now consider the growing of many broadleaved species to be unviable.

The very high deer population of the region presents a severe threat to the ecological importance of many woodlands, particularly ASNW. Without effective management, it is expected that deer numbers may double within the next few years, with resultant greater impact on woodlands.

There is a wide range of products, apart from wood and timber that can be harvested from the woodlands of the East of England including: venison, other animals (including pheasants), fungi, fruit and berries and foliage for floristry.

Pheasants and venison production are likely to be the most significant of these products. Deer are currently culled to reduce damage to tree crops and biodiversity interest, but the populations of all deer species are rising. The marketing of venison is a natural next step. The Scottish Wild Venison Quality Assurance Scheme has set very high standards for this product in terms of methods of culling, storage, butchery and packaging. These are necessary if the meat is to satisfy the requirements of the food retailing industry. This has not been deemed feasible in England. At present only the Forestry Commission and very large estates can meet the standards, particularly in relation to deer larders. If the market for venison does increase in volume, it could make a contribution to one of the most serious woodland management problems.

Linkages to Existing Initiatives

The Government's Woodfuel Strategy for England tasks the Forestry Commission with bringing an additional 2 million tonnes of timber to market per annum in the form of woodfuel by 2020 saving 400,000 tonnes of carbon and supplying the equivalent of 250,000 homes with energy.

The initial target in the East of England is for 110,000 tonnes p.a. by 2013 rising to 200,000 p.a. by 2020 leading to savings of 40,000 tonnes of carbon per year and supplying the equivalent of 25,000 homes with energy.

It is estimated that this will bring an additional 50,000 hectares of woodland into productive management.

If this target is to be reached and more importantly if production is to be sustainable it is essential that woodland once thinned, felled or coppiced is able to regenerate successfully.

With deer populations and densities at current levels this will not happen unless every felled area is deer fenced and if deer populations continue to rise at current rates it will become even more impossible.

Recommendations

General Recommendations

Because of the unusual nature of the wild venison supply chain encompassing as it does recreational stalkers and processing businesses and with the average cost in time in getting an animal from the wood to the primary larder being estimated at between five and ten hours and with muntjac carcasses being worth less than £10 it is unrealistic to assume that that is possible to create a supply chain that is profitable for every element and product in the chain. The best you can hope to do is develop a supply chain capable of processing the increase in the number of deer that require culling, create some profitable businesses and ameliorate the costs for the other elements.
There are already many different types and models of supply chain within the overall supply chain getting venison from forest to plate. Each one in its own way is successful to varying degrees.

Having made contact with many of the different people involved in the sector it is clear that the best way of the project delivering its core aims of reducing the deer population and improving the venison supply chain in the region is not to try and impose some new structure on the supply chain but to work constructively with the existing people and organisations. To expand and improve the existing operations and to bring new people into the process by supporting the establishment of new facilities where they are lacking and where there is a desire to provide them .

This approach will have the benefit of utilising the people who already have the most knowledge and experience of the sector and will hopefully result in their greater engagement rather than their alienation (which is a real danger). But will allow the project to “recruit” new people into the sector thus strengthening it and increasing its capacity.

Currently the biggest failure seems to be in the carcase supply side of the chain rather than in the venison marketing side so it is suggested that the project should initially focus a significant part of its efforts in improving that area, but be prepared to address any shortfalls in processing and marketing capacity as they become evident.

Project Structure

The Deer Initiative Forum in the East of England has set up a regional steering group specifically to manage this project. The membership of the DI Steering Group represents a wide range of statutory partners and also key stakeholders in the form of landowners from the region.

It will also build upon existing DMU structures as well as use and work in partnership with similar initiatives that are already in place in the region. It is anticipated that they will all come under the one umbrella that this project will provide.

An appointed project officer (PO) will deliver the project. The PO will be line managed by the Deer Initiative Liaison Officer in the East Region and will work closely with him. The PO will report to the chair and Deer Forum Steering Group.

The initial proposal was that this should be a stand alone project. However the experience of the Woodfuel East Project in the region has demonstrated that the administration requirements of such a project and the challenge of working within the RDPE criteria could exceed the DI’s capability to provide them. It will therefore be essential that there is considerable dialogue with EEDA as to how the project could be delivered before any commitment is made. One possible way forward would be to investigate if the project could be run in some sort of partnership with the Woodfuel East project, taking advantage of the expertise and processes already developed by that project.

Project Activities

Through a collaborative approach between partners and stakeholders this project will over a four and half-year period provide the sustainable infrastructure for landowners to redress the balance between the impact and value of the damage that wild deer are making to the countryside.

The project's outcome through the utilisation of funds from Axis 1 and 3 will be to:

Manage and steer It will set up a formal steering group to oversee the management of the project. A dedicated project officer will be employed to deliver the project on a full time basis from start to completion.

Collaborate activity on the ground It will encourage contact between all elements of the supply chain to promote better understanding by all involved of the issues that constrain its ability to be effective, competitive and profitable.

It will formalise the existing Deer Management Units (DMU) in the region and promote the establishment of new ones as appropriate. This will encourage co-operation between landowners to cull their wild deer in a coordinated manner and to an agreed management plan. The groups will all be linked to the initiative and encouraged to market their product effectively. They will be able to access the training and advice that will be available through this project.

Advice and training The project will identify key areas of need for training and advice. Using skilled trainers, courses and advice will be made available to deerstalkers, landowners and processors on themes that include culling wild deer, butchering and processing, marketing and distributing it as a quality product to local retail outlets in the East of England.

The project will aim to train 50 Professional deer managers by the end of the project on carcass extraction and handling courses to ensure that quality carcasses are available to the processing facilities. It is anticipated the the majority of these stalkers will already be employed by estates and landowners as game keepers and that this training will give them the skills o be proficient in all aspects of deer management. A further 250 part time stalkers will also be trained to this standard by the end of the project period.

The outcome of the training to the deer managers and stalkers will provide the region with the capability to cull a further 30,000 (26% of the current regional deer population) wild deer each year. Figures from the Forestry Commission and BASC suggest that a professional deer manager should be able to cull 300-500 deer per season and part time stalkers around 20 per season.

The advisory service will aim to support 50 landowners who will be part of the venison supply chain and host the collection larders in topics such as recognizing deer impacts, drafting deer management plans, setting cull targets agreeing leases with stalkers, and installing and managing larder facilities .

Capital infra-structure

The Project will facilitate the provision of capital support for the infra-structure required to expand the venison supply chain. This will include:

- Support for capital items such as high seats, ATVs and trailers, (rifles?) and larders.
- Capital support for some new local processing facilities.
- Capital support for equipment to increase the capacity of existing processing facilities.
- Capital support for specialist carcass and venison transport vehicles.

Budget

Training and Advisory Services

Training courses on:

- Carcass preparation and handling
- RTA course
- Fire Arms course
- ATV/Mule/Trailers course
- Woodland deer management course
- Dogs for deer

Advice to landowners on:

- Recognising deer impacts
- Drafting Deer Management Plans
- Setting Cull Targets
- Agreeing leases with stalkers
- Installing and managing deer larder facilities
- Marketing and branding
- Distribution
- Traceability and quality assurance standards

Numbers trained

Trainees	**Numbers**	**Total**	**Qualification**	**Costs**	**Total Costs**
Deer Managers (Professional Stalkers*)	50	50	DSC1 & DSC 2	£720 per stalker	£36,000
Other Deer Stalkers (Part time)!	50 per annum	250	DSC1 & DSC 2	£720 per stalker	£180,000
Total		**300**			**£216,000**

Landowner courses and advice

Support approximately 50 landowners @ total cost of £**81,500**

* Professional stalkers cull on average 300-500 deer per annum

! Part time stalkers cull up to 20 deer per annum

Projected Project Costs (estimated)

Revenue Costs

Item	**Detail**	**Cost Per Annum**	**Total Costs**	**RDPE Measures**
Staff	Recruitment	2000	2,000	123
	Project manager inc T&S	37000	212,750	123
Office set up	IT inc Database	25000	25,000	123
	Telephones	1000	1,000	123
	Furniture	1200	1,200	123
				123
Office core running	Telephones	600	3,450	123
	Office rental	2500	14,375	123
	Heat, light, power	1000	5750	123
	Stationery	500	2,875	123
Steering Group∗	Room Hire	500	2,875	123
	T&S	800	4600	123
Marketing	Website design	3000	3,000	123
	Website update	1000	5,750	123
	Promotional materials	1500	8,625	123
	Venue hire	1500	8,625	123
External Providers	Marketing consultant (150 days)	52500	262,500	111 & 124**
	Trainers		297,500	111
Total			**861,875**	

∗It is anticipated that these costs will be paid through in kind contribution match funding
** 124 for the Pilot Assurance Scheme

Capital costs

Item	Description	Cost	RDPE Measures
Processing Facilities	6 x Small processing plants	400,000	123
	Additional equipment to increase the capacity of existing processors	400,000	123
Collection/Storage facilities	50 x larder facilities	500,000	123
Vehicles	3 x collection vans	120,000	123
	6 x refrigerated delivery vehicles	120,000	
Associated infrastructure	High seats ATVs	150,000	123
Total		**1,690,000**	

Total Project Costs **£2,849,375**

Appendices

Interviewees

Interviews with marketing organisations

Taste of Anglia – Julie West

Taste of Anglia is an established Regional Food Group.
It is a producers membership organisation with fees ranging from £100-£300 pa.
Main role is getting the producers in contact with the buyers through events such as "Meet the Buyer" and informing the producers of the buyers' requirements and how to achieve them. They also have a distribution arm collecting from their producer members and delivering to buyers.
They are interested in being involved in the venison supply chain and have already spoken to some supermarkets who are prepared to consider selling wild venison if their requirements can be met.
They could either just act as an introduction service introducing processors to potential new clients or fit in between the processors and some of the larger retailers as a marketing agent and/or distributor.
They also provide training; they are a Landskills delivery partner running specialist courses for producers on topics such as packaging, marketing, barcodes, etc.
They believe there is market potential in the supermarket sector, the London restaurant trade and in the production of ready meals and would be interested in developing this.
They would require payment for specific consultancy work.

Luton Hoo Food Hub – Nigel Attree

Luton Hoo food hub acts as a conduit supplying local food into local retail outlets and supermarkets. Nigel Attree believes that there is an opportunity to supply into the supermarkets and the food service supply companies but that there are certain criteria that would have to be met.
Both the supermarkets and the food service supply companies would want a consistent supply of portion sized product available in quantity on demand. In addition the supermarkets would require it supplied in modified air packaging for a minimum 15 day shelf life with timed deliveries to stores or a central depot. They also like to order and invoice electronically.
This would require either a large processing facility and/or a very organised supply chain.
They would be interested in talking further as the project develops.

Interviews with processors

Contact details	
Name	Robert Gooch
Company	Wild Meat Company
Address	Low Road Sweffling,
County	Suffolk
Postcode	IP17 2BU
Tel	01728 663211
Email	
How many carcases	20-40/ during the season
What species	70% fallow, 20% Roe, 10% Muntjac
Where sourced	Stalkers and Landowners in East Suffolk
Where sold	Export, wholesale, retail. London restaurants 20% mail order

Can they get enough carcases	Not enough for the export trade as you really need to be able to fill a lorry ie 10-12 pallets. Currently they are not quite big enough
Are the carcases of the right quality	Not always
What is the issue with quality	Shot damage to carcase
Have they any spare capacity	Yes 2-3 times current throughput
Could they sell more venison	Yes
How much more	20-30%
Would they be interested in expanding	Yes
What would they need to deliver that expansion	More carcases. More carcase handling equipment, scales, vacuum packers.
What would prompt that expansion	More carcasses becoming available
Do they market by species	Yes
Do they have a marketing brand	Yes, The Wild Meat Company
Would they be interested in being part of a regional marketing brand	No
Would they be interested in being part of a regional marketing campaign	Yes
Would they be prepared to put funding into a regional marketing campaign	Maybe if it was county based
Can we use their details in the study	Yes
Comments	Mike I have spoken to David Hooton and Chris Knock of EEDA about this project, but I don't think we have met. I am writing to you following contact from the NFU. As a farmer and venison processor, I cannot understand how you can improve the marketing of wild venison without involving the existing venison processors and marketers. I have not heard from you or David about our involvement in this project but I have told Chris that this project cannot greatly assist venison marketing in our catchment without our involvement. The Deer Initiative really has to go beyond seeing existing venison processors/marketers as the enemy and should try to work closer with them. An 'us and them' approach will simply not improve marketing in the East. A better approach would be to create a protocol and

	brand within each marketer/processor catchment which gets suppliers (farmers/stalkers/keepers) and processors/marketers working together to improve venison prices. I think this is what the proposed project should be focused on and is a model used widely in the food marketing chain. Regards Robert ROBERT GOOCH Wild Meat Company Low Road Sweffling, IP17 2BU UK Tel: +44 1728 663211 Fax: +44 1728 663294 www.wildmeat.co.uk They are an EU cutting plant. They have no lack of potential stalkers. Locally they have access into Budgens , Co-op and Waitrose. They would like to market more locally and build on their brand name. They have a protocol on quality and try to pay a premium for quality carcasses. Further to our telephone conversation, my wish list would be as follows with estimated costs: 1. Refrigerated van to collect venison carcases and deliver venison meat products to market outlets - £20k 2. Vacuum packing machine of sufficient size for red deer saddles - £12k 3. Automatic weigh scales at intake and at dispatch - £15k 4. Machinery to assist with skinning - £5k 5. Security advise and facilities to allow accredited suppliers (stalkers/keepers) to access our game larders 'out of hours' 6. Branding/marketing to our local market - £2-5k pa In addition we would be pleased to provide facilities and trainers for carcase handling and butchery courses to other partners in the project. Another wacky idea - form a co-op of local suppliers who would own a share of the Wild Meat Company to create a truly collaborative approach

Contact details	
Name	[redacted]
Company	[redacted]
Address	

County	
Postcode	
Tel	
Email	
How many carcases	
What species	Mostly fallow
Where sourced	Within a 30 mile radius, direct from stalkers
Where sold	Locally to butchers, restaurant and farm shops
Can they get enough carcases	At the moment yes, but they are a new business in their first season.
Are the carcases of the right quality	Yes
What is the issue with quality	
Have they any spare capacity	Yes
Could they sell more venison	No
How much more	
Would they be interested in expanding	
What would they need to deliver that expansion	
What would prompt that expansion	
Do they market by species	No, but are selling mostly fallow
Do they have a marketing brand	Yes, Radwinter Game
Would they be interested in being part of a regional marketing brand	No
Would they be interested in being part of a regional marketing campaign	Depends on the time requirement
Would they be prepared to put funding into a regional marketing campaign	No
Can we use their name in the study	Comments to remain anonymous but contact details can appear in database
Comments	

Contact details	
Name	Ben Rigby
Company	Ben Rigby Game
Address	Atherstone Lodge Fambridge Road Mundon Maldon
County	Essex
Postcode	CM9 6NL
Tel	01621 741971
Email	

How many carcases	200-500 per week during season
What species	Red, Fallow, Roe, Muntjac
Where sourced	East, South East, as far away as Oxford and Exeter
Where sold	90% export, rest into the London market
Can they get enough carcases	No
Are the carcases of the right quality	Not always.
What is the issue with quality	Often come in with bad shot placement and burst gut therefore contaminated. Have sometimes been laid next to other carcasses causing them to be contaminated. They pay a poorer price for poor quality
Have they any spare capacity	Yes 50%
Could they sell more venison	Yes
How much more	A significant amount
Would they be interested in expanding	Yes
What would they need to deliver that expansion	Additional improved rail system and more chiller capaity
What would prompt that expansion	More carcasses becoming available
Do they market by species	Yes
Do they have a marketing brand	Yes, Ben Rigby Game
Would they be interested in being part of a regional marketing brand	No
Would they be interested in being part of a regional marketing campaign	No
Would they be prepared to put funding into a regional marketing campaign	No
Can we use their details in the study	Yes
Comments	Current opportunity to expand into market as production from New Zealand has fallen from 450,000 carcasses to 300,000 as farmers have moved out of venison production.

Contact details	
Name	Mark Burrage
Company	Bluebell Venison
Address	Rose Cottage Hempnall Road Woodton Bungay
County	Norfolk
Postcode	NR35 2LS
Tel	07771990585

Email	mark@wilddeer.co.uk
How many carcases	2500 - 3000
What species	Red, Fallow, Roe and Muntjac
Where sourced	Sister company Mark Burrage Associates manages the deer on several estates. Currently all carcases come from these stalkers.
Where sold	Locally regionally and nationally. Pubs , restaurants, Hotels, farmers markets and internet sales
Can they get enough carcases	No
Are the carcases of the right quality	Yes as all shot by his trained stalkers
What is the issue with quality	
Have they any spare capacity	Yes they could use
Could they sell more venison	Yes
How much more	Currently 1500 carcases but believes a lot more
Would they be interested in expanding	Yes. See comments
What would they need to deliver that expansion	
What would prompt that expansion	
Do they market by species	Yes
Do they have a marketing brand	Yes Bluebell Venison
Would they be interested in being part of a regional marketing brand	no
Would they be interested in being part of a regional marketing campaign	yes
Would they be prepared to put funding into a regional marketing campaign	perhaps
Can we use their details in the study	Yes
Comments	Mark is an approved trainer for DMQ He is currently looking for new premises to build an EU cutting plant capable of processing 40,000-50,000 carcases per year. He expects this will require a budget of £2.5million. he would be interested in working with the project to secure EEDA funding.

Contact details	
Name	Allan Ellis
Company	Rushyford Game
Address	5, Institute Street Oakhamshaw Crook

County	County Durham
Postcode	DL15 0TB
Tel	07767 237214
Email	info@rushyfordgamedirect.co.uk
How many carcases	
What species	Mostly red and Fallow
Where sourced	North Yorkshire Lancashire and Scottish Borders
Where sold	Locally and Nationally internet sales
Can they get enough carcases	No
Are the carcases of the right quality	
What is the issue with quality	
Have they any spare capacity	Yes
Could they sell more venison	Yes
How much more	Lots
Would they be interested in expanding	
What would they need to deliver that expansion	
What would prompt that expansion	
Do they market by species	Yes
Do they have a marketing brand	Yes Rushyford Game
Would they be interested in being part of a regional marketing brand	no
Would they be interested in being part of a regional marketing campaign	No
Would they be prepared to put funding into a regional marketing campaign	No
Can we use their details in the study	Yes
Comments	Allan has many contacts and markets for venison and would be keen to source from East Anglia. He is particularly interested in Muntjac as it is a species they do not have in their region but believes there would be a good market for it. See his website www.rushyfordgamedirect.co.uk

Contact details	
Name	Mike Brown, The Mike Brown Partnership, consultant Kevin Burrows, Director
Company	C&K Meats
Address	

County	
Postcode	
Tel	01379 870939 mob. 07956 574922
Email	
How many carcases	
What species	
Where sourced	
Where sold	
Can they get enough carcases	
Are the carcases of the right quality	
What is the issue with quality	
Have they any spare capacity	
Could they sell more venison	
How much more	
Would they be interested in expanding	
What would they need to deliver that expansion	
What would prompt that expansion	
Do they market by species	
Do they have a marketing brand	
Would they be interested in being part of a regional marketing brand	
Would they be interested in being part of a regional marketing campaign	
Would they be prepared to put funding into a regional marketing campaign	
Can we use their details in the study	
Comments	C&K Meats is a local business, founded at Brome (near Eye) in 1994 by Chris and Kevin Burrows. In addition to their cutting plant at Brome, near Eye, C&K Meats have owned and operated the JH Lambert abattoir at Bungay since January 2000. The abattoir slaughters cattle, sheep and pigs, almost all from farms in Suffolk and Norfolk. C&K Meats rent and manage 2 beef farms and 3 pig farms to make sure they can meet the demand for locally reared meat. Animals may be slaughtered on contract for farmers who sell meat themselves or for processors dealing direct with local farms. Alternatively animals may be bought for slaughter and onward sale to other secondary processors,

	or for further processing by C&K Meats. C&K Meats butchers meat for sale to restaurants, pubs, nursing homes, schools etc and is committed to using locally produced meat wherever possible. At present the vast majority of the meat is of local origin, including all the pork and lamb and two thirds of the beef. No meat is flown in. The extended facilities of the proposed new abattoir and processing plant would allow an even greater proportion of local meat to be used. The company are building a new State of the art abattoir at Eye in Suffolk to service local livestock producers. The facility is designed to process at least 221,000 carcases per year. 156,000 pigs, 41,000 sheep, 10,400 cattle, 2,600 30 month plus cattle and a currently unspecified number of deer. They are very interested in getting involved in the venison supply chain especially if they can be guaranteed a regular consistent supply of carcases. They were open to the idea of freezing venison to even out any irregularity of supply of carcases and allow them to offer a consistent supply of venison to their customers. They have a good knowledge and access to the supply chain for domestic livestock products which could allow them to get venison into the mainstream market. They would be very interested in further discussions with the DI when both projects have progressed further.

Interviews with Landowners

Name	Trevor Banham
Address	Forestry Commission Santon Downham
County	Norfolk
Postcode	
Tel.	01842 816035
Email	
Area of Holding	25,080 hectares
Area of Woodland	25,080 hectares
Species of deer Present	Red, Fallow, Roe and Muntjac
Do they currently manage their deer	Yes
What are their management arrangements	Deer manager, 7 fulltime deer rangers, plus block lets to St Hubert's, BASC and others with a cull target fixed by others.
Is their deer population Increasing, decreasing or stable	Increasing slightly
What are their cull figures	Red 172 Fallow 434 Roe 760 Muntjac 1588 Total 2954
Where do they sell their venison	Ben Rigby – Game Dealer

Would they be interested in Improving their deer management	Yes they would like to increase their cull but this would need an increase in staff or more let areas.
If grant aid was available what equipment would they be interested in?	N/A
Would they share this with others	They already share their chiller facility at Sandlings and would share their other chiller facilities provided the stalkers produced carcases to FC quality and sold to the FC appointed game dealer.
Would they be interested in any training	Already train their own staff to a high standard but feel there is a real need for better training of private stalkers.
Would they allow their name to be included in the study	Yes

Name	Graham Downing
Address	Bridge Farm, Chediston
County	Suffolk
Postcode	
Tel.	
Email	
Area of Holding	
Area of Woodland	
Species of deer Present	
Do they currently manage their deer	
What are their management arrangements	
Is their deer population Increasing, rising or stable	
What are their cull figures	
Where do they sell their venison	
Would they be interested in Improving their deer management	
If grant aid was available what equipment would they be interested in?	
Would they share this with others	
Would they be interested in any training	
Would they allow their name to be included in the study	

Other comments	Mike Many thanks for forwarding the deer management and venison marketing survey to me the other day. I completed it and sent it on its way. For your information I have been developing my own facilities here at Bridge Farm, Chediston, primarily to accommodate the carcasses which I produce myself. I have converted part of an old dairy parlour and have installed hanging rails, an electric winch and a chiller. I am thoroughly fed up with the derisory prices which one receives for carcasses from the game dealers and I intend to process my own venison and market it through farm gate sales. I have already applied to Suffolk Coastal EH for appropriate registration. Hopefully venison sales will complement our own rare breed lamb and mutton produced on the farm. In the longer term, I am certainly interested in principle of becoming part of the marketing network for East Anglian venison, either as a collecting hub or as a processing centre. Clearly this would require further investment. However, I thought I would register my interest at this point. Regards Graham Downing

Name	Jason Jordan
Address	The Estate Office Luton Hoo Estate Luton
County	Bedfordshire
Postcode	LU1 3TQ
Tel.	01582 721443
Email	jason.jordan@lutonhooestate.co.uk
Area of Holding	1200 acres
Area of Woodland	300 acres
Species of deer Present	Fallow, Roe, Muntjac
Do they currently manage their deer	Yes
What are their management arrangements	Estate stalker, 2 game keepers, 2 recreational stalkers
Is their deer population Increasing, rising or stable	Increasing
What are their cull figures	38 Muntjac 10 Fallow 10 Roe
Where do they sell their venison	Personal use or given away
Would they be interested in Improving their deer management	Yes
If grant aid was available what equipment would they be interested in?	Processing facility High seats

Would they share this with others	Yes
Would they be interested in any training	Yes
Would they allow their name to be included in the study	Yes

Name	Bill Phizacklea
Address	Lower Farm Great Saxham Bury St Edmunds
County	Suffolk
Postcode	IP29 5JT
Tel.	01284 810981
Email	
Area of Holding	450 acres
Area of Woodland	90 acres, 80 ASNW, 10 New
Species of deer Present	Mostly Fallow, a few roe
Do they currently manage their deer	Yes
What are their management arrangements	Gamekeeper shoots
Is their deer population Increasing, decreasing or stable	Stable
What are their cull figures	40
Where do they sell their venison	To procesors
Would they be interested in Improving their deer management	Believe their management is already good
If grant aid was available what equipment would they be interested in?	Already have a chiller store
Would they share this with others	Already act as dealer buying and reselling carcases
Would they be interested in any training	
Would they allow their name to be included in the study	Yes

Name	Adrian Clarke
Address	Hatfield Estate
County	
Postcode	
Tel.	
Email	adrian.clarke@nationaltrust.org.uk
Area of Holding	
Area of Woodland	
Species of deer Present	Fallow,Roe
Do they currently manage their deer	Yes
What are their management arrangements	Own stalkers
Is their deer population Increasing, rising or stable	Rising
What are their cull figures	60-120

Where do they sell their venison	Sold to people who visit the estate
Would they be interested in Improving their deer management	Yes
If grant aid was available what equipment would they be interested in?	They have a grant application in with "Local Food" for a processing unit.
Would they share this with others	May be interested in buying carcasses if demand outstrips supply and they have enough capacity
Would they be interested in any training	Yes
Would they allow their name to be included in the study	Yes
Other comments	They decided to process their carcasses and sell retail when the processors they where using started to demand head and neck shots and turned carcasses away. They initially put up posters on site to advertise their venison and now they currently sell to visitors who buy a whole butchered carcass. The carcasses are processed by a local butcher. They have a bid in with "local food" for 90% of the cost of a processing unit. If successful they will employ a butcher on a contract basis, fee per carcass and will sell joints, mince, burgers and sausages through their shop, restaurant and some farmers markets. If successful they would like to do something similar at Ickworth. If "Local Food bid falls through they would be interested in drawing down funds through the DI project.

Name	Lord de Ramsey
Address	Abbots Ripton Estate The Estate Office Grange Farm Huntingdon
County	
Postcode	
Tel.	
Email	
Area of Holding	5500 acres
Area of Woodland	450 acres
Species of deer Present	Roe, Muntjac, Chinese water deer
Do they currently manage their deer	Yes
What are their management arrangements	Half area shot by gamekeeper, half by stalker
Is their deer population Increasing, rising or stable	Rising
What are their cull figures	15-20 roe
Where do they sell their venison	Half to game dealer half retained for own /staff use
Would they be interested in Improving their deer management	

If grant aid was available what equipment would they be interested in?	Have some high seats
Would they share this with others	
Would they be interested in any training	
Would they allow their name to be included in the study	Yes

Interview with stalker

Edward Byam Cook

Mike,
As a keen stalker I can confirm that the overall economics are not good compared to the hours that are required for deer management / stalking. Any extra funding trying to tackle the huge National ever increase in Deer numbers will be a great help.

It is still a frightening statistic that the Deer numbers killed and injured on UK roads annually is close to the total Scottish deer cull. The facts that other European countries kill as many on their roads is of no comfort.

I am told that the UK deer cull really needs to double from the current number.

More venison and game eating events will also greatly stimulate greater public demand for this very good meat.

Call me if I can help.

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Email - elbyamcook@aol.com Registered Office: The Commercial Centre, 6 Green End, Comberton, Cambridge CB23 7DY Reg No 5097682 VAT Reg No 388 745 489

Edward is part of a deer syndicate, they shoot in Lincolnshire some considerable distance from home. The landowner retains the venison. They shoot 40-60 deer mostly fallow. He believes the economics would work better if they could sell into a better quality market. He believes there is a strong demand for venison if it is presented properly and that we are currently not producing the right product in the right way.
Customers need to have the seasons explained to them.
He believes there is a demand for flat packed chiller that can be self erected and for private range facilities and events where stalkers can improve their shooting skills.